



Filter Tasks and Requirements



Table of Contents

- **Objectives**
- **IDEAS Main Landing Page**
- **Task Filters**
- **Requirements Filters**
- **Summary**



Lesson Objectives

- **Objective:**
 - **Upon completion of this lesson the customer will be able to:**
 - Use the *Tasks* filter.
 - Use the *Requirement* filter.



IDEAS Main Landing Page

Actions: One can enter a new requirement.

My Tasks: Locate an assigned task and review/complete.

My Requirements: Locate a Requirement to select and either review or take further action.

News Tasks (7) Records Reports Actions

Chris BurgoyneCust

My Requirements

Actions

My Tasks

Filters ▶

Export

Task	Requirement #	Received	Assigned To
Respond to Correspondence from Chris BurgoyneCS for Requirement A000034		9/23/2015 10:55 AM EDT	Chris BurgoyneCust
Update Correspondence for Requirement A000034		9/23/2015 10:54 AM EDT	Chris BurgoyneCust
Customer Input for A000035		9/23/2015 10:47 AM EDT	Chris BurgoyneCust
Customer Input for A000035		9/23/2015 10:47 AM EDT	Chris BurgoyneCust
Customer Input for A000031		9/23/2015 10:46 AM EDT	Chris BurgoyneCust
Customer Input for A000035		9/23/2015 10:42 AM EDT	Chris BurgoyneCust
Manage Enclosure Documents for Requirement A000035		9/23/2015 10:42 AM EDT	Chris BurgoyneCust
Manage Enclosure Documents for Requirement A000035		9/23/2015 10:42 AM EDT	Chris BurgoyneCust
Enter Requirement Package		9/23/2015 10:39 AM EDT	Chris BurgoyneCust
Select Organization		9/23/2015 10:39 AM EDT	Chris BurgoyneCust
Customer Input for A000034		9/23/2015 10:39 AM EDT	Chris BurgoyneCust
Manage Enclosure Documents for Requirement A000034		9/23/2015 10:38 AM EDT	Chris BurgoyneCust
Manage Enclosure Documents for Requirement A000034		9/23/2015 10:38 AM EDT	Chris BurgoyneCust
Enter Requirement Package		9/23/2015 10:35 AM EDT	Chris BurgoyneCust
Select Organization		9/23/2015 10:35 AM EDT	Chris BurgoyneCust

1-10 of 10 items

My Requirements

Filters ▶

Export

Procurement Object	Identifier	Requirement Number	Status	Contract Specialist	Contracting Officer	Contracting Office	Created Date
Requirement	A000035	987TYV	Submitted				9/23/2015 10:42 AM EDT
Requirement	A000034	55R3V	Assigned/Accepted	Chris BurgoyneCS	Chris BurgoyneKO	PL511	9/23/2015 10:38 AM EDT
Requirement	A000033	Test FPOS-NG for Type A Contract	Validated			PL71	9/23/2015 10:38 AM EDT
Requirement	A000032	55REQ6	Assigned/Accepted	Chris BurgoyneCS	Chris BurgoyneKO	PL511	9/23/2015 10:33 AM EDT



Task Filters

UNCLASSIFIED

Filters include:

- **Task Name:** Search by task name or a portion of the task name.
- **Assigned To:** Search tasks by group or user
- **Requirement Number:** Search by the requirement number.
- **Status:** Filter between All, Active, or Completed Tasks.
- **Received:** Choose between two dates, or before, on, or after a certain date.

My Tasks

Filters ▼

Task Name

Assigned To

Requirement Number

Status

Active

▼

Received

Between

▼

M/d/yyyy

M/d/yyyy

Export

Clear Filters

Refresh

Task	Requirement #	Received	Assigned To
Respond to Correspondence from Indah Gass_CS for Requirement A000041		9/28/2015 9:13 AM EDT	Indah Customer
Respond to Correspondence from Indah Customer for Requirement A000476		6/4/2015 2:29 PM EDT	Indah Customer
Respond to Correspondence from Indah Gass_CS for Requirement A000333		4/8/2015 3:03 PM EDT	Indah Customer
Update Correspondence for Requirement A000227		4/1/2015 1:10 PM EDT	Indah_CS; Indah Customer



Requirements Filters

Requirement Filters include:

- **Identifier:** Search by the system-generated identifier associated with each Requirement.
- **Requirement Number:** Search by the user-entered Requirement Number.
- **Status:** Choose between Requirements at different steps in the submission process: *Validated*, *Submitted*, and *Assigned/Accepted*.
- **Contract Specialist and Contracting Officer:** Filter by the assigned Contract Specialist or Contracting Officer.

My Requirements

Filters ▼

Identifier

Requirement Number

Status

-- Select One --

Contract Specialist

Contracting Officer

Office

[Export](#)

[Clear Filters](#)

[Refresh](#)

Procurement Object	Identifier	Requirement Number	Status	Contract Specialist	Contracting Officer	Contracting Office	↓	Created Date
Requirement	A000090		Assigned/Accepted	Chris BurgoyneCS	Chris BurgoyneKO	PL511		10/12/2015 7:08 PM EDT
Requirement	A000082		Assigned/Accepted	Chris BurgoyneCS	Chris BurgoyneKO	PL511		10/6/2015 10:43 PM EDT



Summary

- **In this lesson you learned how to:**
 - Use *Filters* to locate *Tasks*.
 - Use *Filters* to locate *Requirements*.



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